



*Working together to improve the  
educational environment for California's kids*

# Architect's Submittal Guidelines

A guide to assist school districts and architects to  
prepare project plans, specifications and cost estimates for  
School Facility Program applications

**February 2006**

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# SECTION 1

## Overview

### Introduction

These guidelines were developed to assist school districts and architects to prepare project plans, specifications and cost estimates for review of School Facility Program (SFP) applications by the Office Of Public School Construction's (OPSC) Plan Verification Team (PVT).

### Laws and Regulations

Authority cited: Section 17070.35, Education Code.

Reference: Sections 17070.35, 17072.12 and 17072.35, Education Code.

These *Architect's Submittal Guidelines* interpret the Regulations related to the Leroy F. Greene School Facilities Act of 1998.

Additional funds are granted for site development costs under California Code of Regulations (CCR) Section 1859.76, a, b and c. A glossary of SFP terms is listed in **Appendix 1**.

### Plan Verification Team

The following items are reviewed by Plan Reviewers of the PVT:

- Application for Funding (Form SAB 50-04).
- Approved construction plans and specifications (P&S) by Division of the State Architect (DSA) and California Department of Education (CDE).
- Off-site plans for work required by local entities.
- Cost estimates to verify the grant amounts for service site development, off-site development and utilities in accordance with CCR Section 1859.76.

## Project Types

### New Construction

The SFP new construction grant provides State funds on a 50/50 State and local sharing basis for public school capital facility projects in accordance with statute. Eligibility for State funding is based on a district's need to house pupils and is determined by criteria set in law, beginning with Education Code, Section 17070.10 and California Code of Regulations, beginning with Section 1859.

Education Code Section 17072.10 establishes the "new construction grant" per unhoused pupil for new construction projects.

This "new construction grant" amount is intended to provide the State's share for all necessary project costs with the exception of site acquisition, utilities, off-site and service-site development. The necessary project costs include, but are not limited to, funding for design, the construction of the building, general-site development, education technology, unconventional energy, tests, inspections and furniture/equipment. The grant amounts are adjusted for inflation each year.

For new construction projects, the district must submit a complete set of P&S for the project. The P&S must have current DSA and CDE approval. DSA approval ensures that these P&S are in compliance with California's requirements for structural safety, fire and life safety, and accessibility. The CDE approval assures the project meets all educational requirements of the CDE.

In all cases, there must be an architect of record for a new construction project.

The approval of off-site plans or the certification of compliance by the local entities ensures that off-site improvements shown on the plans do not exceed the minimum requirements to develop the site to meet local standards. Off-site plans must have local entity approval.

### Modernization

The SFP modernization grant provides State funds on an 60/40 basis for improvements to educationally enhance school facilities. Projects eligible for modernization grants include such modifications as air conditioning, plumbing, lighting, and electrical systems. Site acquisition may not be included in modernization applications.

Education Code Section 17074.10 establishes the "modernization grant" for each pupil to be housed in buildings to be modernized.

The "modernization grant" amount is intended to provide the State's share for all necessary project costs. The necessary project costs include, but are not limited to, funding for design, the modernization of the building, education technology, unconventional energy, tests, inspections, general site development, and furniture/equipment. The grant amount is adjusted for inflation each year.

For modernization projects, the district must submit a complete set of P&S for the project. The P&S must have been reviewed and approved by DSA and CDE. Additionally, there must be an architect of record for the modernization project.

## SECTION 2

# New Construction Plan Requirements

### New Construction Submittal

Plans should include all work eligible for funding through SFP and should be approved by DSA. If plans are submitted in AutoCAD format, a copy of DSA signed stamp from the the approved plans is required.

Plans to be submitted include those for Site, Civil, City/County Street Development, Architectural (along with portable facilities), Structural, Electrical, Plumbing, Mechanical, and Landscape.

New plans will not be accepted during the review process once OPSC acknowledged the School District Project Application as a complete package.

See **Appendix 2** for a list of "Plans Required with Submittal."

### Drawing Requirements

The title sheet should include the following:

- Vicinity Map—indicate location by showing major highways and roads, for the purpose of determining the geographic index.
- Index to Plans—identify all plans and details representing work eligible for funding by the State Allocation Board (SAB). If submitting plans in AutoCAD®, include the file number in reference to all plans. Refer to Appendix 3 for a sample index.
- Include on all plan lay-out sheets:
  - North Arrow and Scale.
  - Legend showing specific item and material types and construction notes.
- Identify any of the following:
  - Buildings and structures to be demolished, moved, or constructed.
  - Buildings and/or areas that are Not in Contract (NIC). If NIC items are part of the proposed project, but included in another contract, the appropriate plan set should be part of the submittal to verify the items included in the site allowance request.
  - Portable facilities.

## Civil

Civil drawings should include existing conditions and demolition plans, and the following:

- Proposed changes in the existing site contour.
- Layouts of the proposed installation of utilities.
- Complete storm drainage system, both on and off-site.
- Required cut and fill and engineered fill for building pads must be shown and supported by the soils report for the project.
- Complete off-site development may be indicated by separate City/County approved plan sets, including required landscaping and street lighting.

## Architectural

Architectural drawings must include the following:

- Dimensions of all proposed buildings, including interior dimensioning.
- Labeling of facilities.
- Accessibility details for elevators, lifts, and access ramps.
- Special Day Classroom (Severe and Non-Severe) facilities should be labeled as such if included.

## Structural

Include drawing details for retaining walls or ramp structures designed to mitigate a grade change greater than six feet with a grade of two to one or greater.

## Plumbing

To verify additional grants for utility services the district must provide plans for the installation of main supply line from the utility (water, sewer, and gas) point of connection (POC) for the existing utility service to the meter or

- If there is no meter, show POC to the first building lateral.
- Any sewage treatment disposal system.
- Fire suppression water storage and pumping systems, or, domestic water storage and pumping systems, when required.

## Electrical

Provide plans for the installation of electrical service and/or communication service from the utility or company POC to the nearest distribution center.



# SECTION 3

## New Construction Cost Estimate Details

### Introduction

The district must submit a cost estimate for site development work and is encouraged to utilize the *Site Development Worksheet for Additional Grants*. The preformatted *Site Development Worksheet for Additional Grants* can be found on the OPSC Web site. Any documents required to substantiate the work must be submitted.

**Note:** Include only the estimated costs for all construction activities including deferred items of construction. Do not include costs for future work, site acquisition, tests, inspection and furniture/ equipment (F&E) not included in the P&S or contingencies.

### Detailed Cost Estimate

Provide detailed itemization of quantities and costs that can be verified in the plans. Costs should be separated and listed as follows:

- 1) Service-site and development costs
- 2) Off-site costs
- 3) Utility services costs

### Example of Itemization

The following is an example of an itemized cost estimate:

CATEGORY	SUB-CATEGORY	ITEM TYPE AND SIZE	QUANTITY	UNIT COST	TOTAL
Service Site	Drainage	PVC 10" Dia	80 LF	\$81.41	\$6,512.80

In addition to the above, include an index total, applicable to this particular project.

Lump sums that cannot be verified will not be considered for grant costs.

### Other PVT Requirements

The following are required:

- If the site development involves off-site improvements, either the off-site plans have been approved and signed by the local authority or a preliminary approval letter issued by the local authority (see Appendix 6); and
- A copy of the CDE final plan and site approval letter.

## State Allocation Board Approval

The SAB will approve reasonable and appropriate site development work which meets common engineering practices and industry standards, that:

- Are consistent with the specific site conditions, and site development costs and the Saylor "Current Construction Costs."
- The design professional has certified to the district that the site development work does not exceed the minimum requirements to develop the site to meet educational needs and/or standards.

## Service Site Development Definition

Service Site Development prepares the site for building or infrastructure construction and is performed within school property lines. Service Site includes site demolition, rough grading, soil compaction, drainage and eligible erosion control. Refer to CCR Section 1854.76(a).

## Separate Site Development Bid

If bids are opened for the site work portion of the project prior to submitting the *Application for Funding* (Form SAB 50-04), the school district may elect to submit the bid supported with a detailed cost estimate and plans dated prior to bid date to justify scope of work included in the submitted bid.

## Service Site Development

Indicate eligible costs as follows in a format that follows the California Code of Regulations Section 1859.76(a):

**Site Clearance, Section 1859.76(a)(1).** Removal of trees, brush and debris.

**Demolition, Section 1859.76(a)(2).** Demolition and removal of existing buildings and site improvements that lie in the footprint of a building or proposed site development.

**Rerouting Utility Lines, Section 1859.76(a)(3).** Removal and rerouting of existing utility service lying in the footprint of a proposed building or proposed site development.

**Rough Grading, Section 1859.76(a)(4).** Includes cut and fill, compaction, and rough contour operations required in the design of the project.

**Soil Compaction, Section 1859.76(a)(5).** Over-excavation for building pads and other improvement areas including excavation, backfilling, and compaction must be supported by the geotechnical report.

**Storm Drains, Section 1859.76(a)(6).** On-site drainage facilities including inlets, below grade drainage facilities, and retention basins up to five feet from the building. Excluding surface drainage facilities for on-site parking lots and field or landscape areas.

- For building addition to an existing school campus, all necessary on-site drainage facilities for the new construction as described above shall be eligible.

**Erosion Control, Section 1859.76(a)(7).** Includes temporary and permanent erosion controls.

- Erosion control for Storm Water Pollution Prevention (SWPP) including sand bags, straw, silt fences, and etc. as required by the local authority.
- Erosion control for permanent slope protection such as plant material, temporary sprinkler systems, jute mesh and straw, due to embankments having a slope of at least 2:1 and a vertical height greater than six feet. (Permanent sprinkler systems are also allowed and are more appropriate to the purpose of erosion control.)

**Stairs, Ramps, & Retaining Walls, Section 1859.76(a)(8).** Outside stairways, handicapped access ramps and retaining walls due to embankments having a slope of at least 2:1 and a vertical height greater than six feet.

**Relocation of Portables in the Footprint of the Building, Section 1859.76(a)(9).** Relocation of portables which lie in the footprint of a proposed building or the footprint of proposed site development including:

- The cost of set-up and utilities if the portable is to be relocated on the same site.
- A portable building may be moved to a permanent on-site location only once during construction.
- If the portable is to be moved to another site, only the moving costs are eligible.

**Fire Code Requirements, Section 1859.76(a)(10).** Include fire code requirements on site up to five feet from the buildings.

- All weather fire service roads and site access gates necessary to meet the State Fire Marshal minimum requirements.
- Hydrants and related water supply lines deemed necessary by the DSA's fire, life and safety requirements.
- Fire Department Connections, post indicators, and related fire protection piping required by fire departments.
- Sprinkler systems and chemical extinguishing systems inside the buildings are considered building costs and are included in the per pupil grant.

**Multi-Level Parking, Section 1859.76(a)(11).** Funding for multi-level, single-level subterranean or under-building parking structures on a new construction project when the following requirements have been met:

- The new construction project will be located on site acreage that is less than 50 percent of the site size recommended by the CDE for the master-planned project capacity.
- The number of parking stalls to be funded does not exceed 2.25 for each classroom constructed in an elementary or middle school project.
- The number of parking stalls to be funded does not exceed 6 for each high school classroom constructed in a high school project that will serve 9–12 pupils.
- The State grant does not exceed \$7,500 per parking stall-adjusted annually per Section 1859.71.

**Removal and Relocation of Classrooms, Section 1859.76(a)(12).** Removal and relocation of classrooms on a site eligible for replacement pursuant to Section 1859.82(a) that are available for housing pupil pursuant to Section 1859.35(a).

## Off-Site Development

### California Code of Regulations Section 1859.76(b)

Additional grants are provided for defined off-site work and are limited to two contiguous adjacent sides of the site from the property line to the street centerline as required by local ordinances/authorities.

- Items include preparatory grading, collection of site drainage to an existing point of connection, paving, curb, gutter, sidewalks, street lights and planting areas as mandated by local ordinances/authorities.
- Local entities having jurisdiction of areas where the off-site development is proposed must approve the related plans and specifications. As an alternative, the school district may submit a letter signed prior to the date the funding application is submitted to OPSC, by the local authority having jurisdiction that the final P&S have been received; reviewed; and, the work is required and does not exceed the minimum standard required by local ordinances. Refer to Appendix 6 for a sample letter.

**Curbs, Gutters, & Paving, Section 1859.76(b)(1).** Curbs, gutters and paving of streets not to exceed one-half of the local street code requirements and mandated by the local ordinances/authorities. When the existing streets are to be widened toward the property line from the existing face of the curb, all new street improvements lying within one-half of the mandated street width adjacent to the project are eligible.

**Sidewalks, Section 1859.76(b)(2).** Sidewalks as mandated by local ordinances/authorities. See Appendix 4 for an example.

**Street Lighting, Landscaping, & Signage, Section 1859.76(b)(3).** Street lighting, planting areas, street signage, traffic signals, trees or other costs mandated by local ordinances/authorities.

**Special District and Utility Connection Fees, Section 1859.76(b)(4).** Include utility fees from utility districts and utility companies.

- Special district utility fees such as domestic water, storm water, and waste water for capital development, are eligible for additional grants. Fee structures or formulas from the utility districts used to calculate fees, and the fee calculations are provided to OPSC for verification.
- Utility connection fees such as electric, gas, and communication are also eligible for additional grants. Fee information from the utility companies is provided to OPSC for verification.

**Storm Drain Costs, Section 1859.76(b)(5).** Reasonable cost for storm drains beyond school site property line to POC.

**Safety Paths, Section 1859.76(b)(6).** Safety paths beyond the property line under specific conditions for pedestrian use beyond two immediately adjacent sides of the site, which are necessary for a safe route to the school site, are eligible for funding when the following conditions are met:

- The school district governing board has made a finding at a public hearing that pedestrian safety concerns require improvements in the form of safety paths to provide access to the school site, and CDE concurs with that finding.
- The improvements are limited to the work necessary to install concrete, asphalt, gravel or other paving necessary to provide the safe paths.
- The State grant does not exceed \$50,000.
- The improvements do not include any cost for the acquisition of land, easements or other rights-of-way.
- The SAB has determined that development of additional pedestrian paths is reasonable.

## Utility Service

Utility service costs are those costs associated with the CDE approved site size and are necessary to serve the master-planned capacity of the site. For additions to existing schools, all utility services must be connected to the nearest available site source. If it is necessary to do otherwise, a registered engineer must certify that the existing lines will not adequately support the new facilities, and that new routing is required.

## Eligible Utility Costs

For each of the following categories utility company connection fees are eligible. Special fees should be requested as part of California Code of Regulations Section 1859.76(b)(4) with the appropriate supporting documentation.

**Water, Section 1859.76(c)(1).** Installation of water supply line(s) between the serving utility's point of connection (POC) and the meter including:

- Meters not provided by the serving utility,
- New water line tapping into existing water main,
- If required, the installation of a domestic water system (i.e., well, pump, tank).
- For new facility addition to an existing school campus, installation of new water supply line between the existing water main POC and to five feet of the nearest new building is eligible.

When an on-site water system is required, the supply line from the well and storage tank to the first building lateral is eligible.

**Sewer, Section 1859.76(c)(2).** The installation of the main sewage disposal line between the serving utility's POC and the first building lateral, typically the first sanitary tee on the main sewage line.

- If required, the installation of an on-site sewage treatment disposal system and a main disposal line from the treatment system to the nearest building lateral of the collection system.
- For building addition to an existing school campus, installation of new sewer line between the existing sewer main POC and to five feet of the nearest building is eligible.

**Gas, Section 1859.76(c)(3).** The installation of the supply line between the utility company's POC and the meter including:

- Installation of meters not provided by the utility company.
- If required, the connection of liquefied petroleum gas system from the main supply line to the first building lateral including a storage tank if purchased by the school district
- For building addition to an existing school campus, installation of new gas line between the existing gas main POC and to five feet of the nearest building is eligible.

**Electrical, Section 1859.76(c)(4).** The installation of service between the serving utility and the building switchboard:

- Primary electric service between the utility company's POC and the transformer
- Secondary electric service between the transformer and the main switchboard
- Transformers not provided by the serving utility, pads, and protective bollards
- For building addition to an existing school campus, installation of new electrical service line between the existing electrical POC and to five feet of the nearest building is eligible.

The cost for main switchgear and switchboard are included in the basic pupil grant.

**Communications, Section 1859.76(c)(5).** The installation of cable television and telephone service between the serving utility or the nearest POC and the nearest distribution center.

- For building addition to an existing school campus, installation of new cable television and telephone service line between the existing communication POC and to five feet of the nearest building is eligible.

### Ineligible Utility Costs

Costs that are not eligible include the following:

- Any oversized installation beyond the school's needs.
- Line installation that is not part of the shortest connection from serving utility to school site connection.
- Any water or gas service beyond the meter except well service.
- Any sewer service beyond the first building lateral except on-site leach field systems.
- Any electrical service beyond the entrance to the main switchboard.
- Any telephone service beyond the main distribution center.

## SECTION 4

# Modernization Plan Requirements

### Introduction

Plans should include all work eligible for funding through SFP and should be approved by DSA. If plans are submitted in AutoCAD format, a copy of DSA signed stamp from the approved plans is required.

Submit all plans necessary to substantiate modernization work. In addition, submit plans for work associated with excessive cost hardship requests listed on the *Application for Funding* (Form SAB 50-04) for rehabilitation/mitigation, accessibility, fire code, and elevators.

See **Appendix 2** for lists of "Plans Required with Submittals."

### Drawing Requirements

The title sheet should include the following:

- Vicinity Map – Indicate location by showing major highways and roads for the purpose of determining the geographic index.
- Index to Plans – Identify all plans and details representing work eligible for funding by the SAB. If applicable, include the AutoCAD file number in reference to all plans. Refer to Appendix 3 for a sample index.
- Labels should identify any of the following:
  - *Buildings and structures to be demolished, moved, or constructed.*
  - *Buildings and/or areas, which are Not in Contract (NIC).*
  - *Portable facilities.*
- Include on all plan lay-out sheets:
  - *North Arrow and Scale.*
  - *Legend showing specific item and material types.*

### Architectural

Architectural drawings must include the following:

- Dimensions of all proposed buildings, including interior dimensioning.
- Labeling of facilities.
- Accessibility details for elevators, lifts, and access ramps.
- Special Day Classroom (Severe and Non-Severe) facilities should be labeled as such if included.
- Portable facilities.

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# 5 SECTION

## Modernization Cost Estimate Details

### Introduction

The district must submit a cost estimate for the entire project. A detailed cost estimate and any document required to substantiate the work must be submitted.

**Note:** Include only the estimated costs for all construction activities including deferred items of construction. Do not include costs for site acquisition, planning/design, test, inspection and furniture/equipment (F&E) not included in the P&S or contingencies.

### Detailed Cost Estimate

Provide detailed itemization of quantities and costs that can be verified in the plans.

All direct construction costs should be summarized into a cost breakdown summary sheet and to be broken down either by Trade or by CSI Master Format. All indirect construction costs such as, general requirements, overhead and profits and fees shall be listed separately.

### Cost Estimate for Additional Grant Utility Cost

Districts requesting for upgrading existing site development (utilities) work as necessary for the modernization of 50 years or older permanent buildings must provide a separate detailed itemization cost estimate for site utilities repair or replacement. Cost estimate should be broken down to each utility (i.e., water, sewer, gas, electrical and communication).

### Example of Itemization

The following is an example of an itemized cost estimate:

CATEGORY	SUB-CATEGORY	ITEM TYPE AND SIZE	QUANTITY	UNIT COST	TOTAL
Site Cost	Sewer	PVC-SDR 35, 8"	150 LF	\$39.81	\$5,971.50

### Other Requirements

The following are required:

- A copy of the DSA stamp must be provided for date verification.
- A copy of the CDE final plan approval letter.

## Additional Eligible Utility Costs for 50 Years or Older Permanent Building(s)

### Regulation 1859.78.7

The board shall provide funding for upgrading existing site utilities work necessary for the modernization of 50 years or older permanent building(s) equal to the lesser of 60 percent of verified eligible cost to upgrade utility service or 20 percent of the funding authorized by Section 1859.78.6. To verify eligible cost to upgrade utility service, the district must provide Site Diagram identifying the 50 years or older building(s) and the following DSA approved Site Utility Plans:

**Plumbing.** Plumbing site plans for the replacement or repair of utility lines (water, sewer, and gas) between the utility company point of connection (POC) and to five feet from the 50 years or older permanent building(s).

- Meter not provided by the serving utility
- New line tapping into existing water, sewer or gas main
- If required, the installation of domestic water system (i.e., well, pump, tank)
- When on site water system is required, the supply line from the well and storage tank to five feet from the building is eligible
- If required, the installation of an on-site sewage treatment disposal system and a main disposal line from the treatment system to five feet from the 50 building is eligible
- If required, the connection of liquefied petroleum gas system from the main supply line to five feet from the building including a storage tank if purchased by the school district

**Electrical.** Electrical site plan for the replacement or repair of utility lines (primary/secondary service and communications) between the utility company point of connection (POC) and to five feet from the 50 years or older permanent building(s).

- Primary electric service between the utility company's POC and the transformer
- Secondary electrical service between the transformer and the main switchboard
- Transformer not provided by the serving utility
- Cable television and telephone service

## SECTION 6

# Facility Hardship Documentation for PVT Review

### Facility Hardship Submittal

Submit all as-built or new plans necessary to substantiate rehabilitation/mitigation work. If as-built or new plans are not available, supporting documentation such as diagrams, photos, or engineering reports regarding the existing project site condition must be submitted.

### Detailed Cost Estimate

Provide detailed itemization estimate of quantities and costs to mitigate the problem that can be verified in the plans if the plans are available or in the supporting documentation. Costs must be consistent with the most current edition of the *Saylor Remodeling/Repair Construction Cost*.

### Example of Itemization

The following is an example of a unit cost estimate:

ITEM DESCRIPTION	QUANTITY AND UNIT	UNIT COST	TOTAL
Demo exiting concrete footing	2.00 CY	\$ 55.00	\$110.00
Cast-in-place new concrete footing	3.00 CY	\$250.00	\$750.00

Lump sum that cannot be verified will not be considered.

The following indirect construction cost must be listed separately:

- Overhead and profit
- Contingencies
- Construction "soft costs" such as design fees, permit fees, testing, inspection, etc.

### Cost Benefit Analysis

Provide a cost benefit analysis that indicates the minimum work necessary to mitigate the identified health or safety problems and compare this with the cost to replace the facility (which could represent only the site). If the total cost to mitigate the health or safety problem and remain in the facility exceeds 50 percent of the current replacement cost of the facility or site, it can be considered for abandonment and replacement. However, if the cost to remain in the facility is less than 50 percent of the current replacement cost, the district may qualified for rehabilitation. A qualifying replacement project will receive 50 percent of the eligible verified costs from the submitted cost estimate. A rehabilitation project will receive 60 percent of eligible verified costs. For more information, refer to Section 11 of the *School Facility Program Guidebook* available on the OPSC Web site at [www.opsc.dgs.ca.gov](http://www.opsc.dgs.ca.gov).

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# APPENDIX 1

## Glossary

For a more complete list of words and phrases, see the **School Facilities Program Regulations, Section 1859.2, Definitions.**

Most of the terms and meanings shown below were taken from Section 1859 and pertain to the plan verification review. Further elaboration of the definitions is shown in a different typeface are taken directly from Education Code Sections.

**Act**—the Leroy F. Greene School Facilities Act of 1998.

**Application**—a request pursuant to the Act to receive an eligibility determination and/or funding for a school project.

**Appointment**—shall have the meaning set forth in Education Code Section 17070.15(a), which is “a grant for the purpose of eligible new construction, modernization, or hardship approved by the Board for an applicant school district.”

**Board**—the State Allocation Board as established by Section 15490 of the Government Code. OPSC staff and these Guidelines use the acronym SAB, interchangeably.

**CDE**—the California Department of Education, School Facilities Planning Division have responsibility for school facilities issues including the approval of sites and plans.

**Certification**—the act of affirmatively representing, asserting or verifying circumstances, data or information as required by the Act or this subgroup.

**Class B Construction Cost Index**—a construction factor index that is provided monthly by Marshall and Swift, for the Western area, for structures made of reinforced concrete or steel frames, concrete floors, and roofs. It is accepted and used by the Board to “annually adjust the factors set forth in [Education Code] subdivision (a) 17074.10(a).

**Classroom**—a teaching station that has the same meaning as the term used in Education Code Section 17071.25(a)(1), which is “any space that was constructed or reconstructed to serve as an area in which to provide pupil instruction.”

**Current Replacement Cost**—a base amount of \$168.50 per square foot represents 50 percent which the SAB provides for toilet space and \$84.00 per square foot for all other spaces. The amounts shown will be adjusted annually in the manner prescribed in Section 1859.71.

**Department**—the Department of General Services.

**Division of the State Architect (DSA)**—the State office within the Department of General Services that reviews school building plans and specifications for structural, fire safety and access compliance.

**Facility**—all or a portion of any real property, site improvements, utilities and/or buildings or other improvements contained in the project.

**Footprint**—outline on the surface of the structure to be built.

**Lease-Purchase Program (LLP)**—the Leroy F. Greene State School Building Lease Purchase Law of 1976, commencing with Education Code Section 17000.

**Modernization**—any modification of a permanent structure that is at least 25/50 years old, or in the case of a portable classroom, that is at least 20 years old, that will enhance the ability of the structure to achieve educational purposes.

**Modernization Adjusted Grant**—the total of the modernization grant, plus any additional and excessive grants.

**Modernization Grant**—the funding provided pursuant to Education Code Section 17074.10(a).

**New Construction Adjusted Grant**—the amount of funding provided by a new construction grant, plus any additional and excessive cost grant funds.

**New Construction Grant**—the funding provided pursuant to Education Code Section 17072.10(a).

**Office of Public School Construction (OPSC)**—the State office within the Department of General Services that assists the Board as necessary and administers the Act on behalf of the Director.

**Off-Site**—the site development that is performed outside of school property lines. Eligible off-site work is limited to two streets adjacent to the school property, from the property line to street centerline.

**Permanent Site**—any area not included in a portable classroom.

**Permanent Classroom**—any classroom not meeting the definition of portable classroom.

**Portable Classroom**—a classroom building of one or more stories that is designed and constructed to be relocatable and transportable over public streets, and with respect to a single story portable classroom, is designed and constructed for relocation without the separation of the roof or floor from the building and when measured at the most exterior walls, has a floor area not in excess of 2,000 square feet.

**Property**—all property, real, personal or mixed, tangible or intangible, or any interest therein necessary or desirable for carrying out the purposes of this chapter.

**Rehabilitation Cost**—health and safety mitigation cost that is less than 50 percent of the current replacement cost of the facility.

**School Building Capacity**—the capacity of a school building to house pupils.

**School District**—a school district or a county office of education. For purposes of determining eligibility under this chapter, “school district” may also mean a high school attendance area.

**School Facility Program (SFP)**—either the new construction or modernization programs implemented under the Act by these Subgroup 5.5 regulations.

**Section**—a section in these Subgroup 5.5 regulations.

**Service Site**—the site development work which prepares the site for building or infrastructure construction and is performed within school property lines.

**Special Day Class**—a class that has pupils enrolled that are individuals with exceptional needs.

**Square Footage**—the enclosed area measured from the outside face of exterior structural walls of the building. For interior areas or portions of building areas, the enclosed area shall be measured from centerline to centerline of the interior walls.

**SAB**—the State Allocation Board.

Note: Authority cited; Section 17070.35, Education Code.

Reference: Sections 17009.5, 17017.6, 17017.7, 17021, 17047, 17050, 17051, 17070.15, 17071.10, 17071.25, 17071.30, 17071.33, 17071.35, 17071.40, 17072.10, 17072.12, 17074.10, 17075.10, 17975.15, 17280, and 56026, Education Code.

Section 53311, Government Code.

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## APPENDIX 2

# Plans Required with Submittals

Regulations related to the Leroy F. Greene School Facilities Act of 1998.

### New Construction Submittals

#### Service Site, Section 1859.76(a)

TYPE OF DRAWING	FULL DETAILS TO SUPPORT COST ESTIMATE
Civil	<ul style="list-style-type: none"> <li>• Demolition and Site Clearance</li> <li>• Grading – on and off-site</li> <li>• Storm Drainage – on and off-Site</li> <li>• Erosion Control</li> <li>• Fire Code Requirements (the fire suppression loop and fire hydrants may sometimes be located on Plumbing Plans)</li> </ul>

#### Off-Site, Section 1859.76(b)

TYPE OF DRAWING	FULL DETAILS TO SUPPORT COST ESTIMATE
Civil	<ul style="list-style-type: none"> <li>• Demolition, Site Clearance, Infrastructure Relocation</li> <li>• Grading – Elevation</li> <li>• Storm Drainage</li> </ul>
Architectural	<ul style="list-style-type: none"> <li>• Paving and sidewalk cross-sections</li> <li>• Safety path for pedestrian use beyond the site</li> </ul>
Electrical	<ul style="list-style-type: none"> <li>• Street signs and lighting</li> </ul>

#### Utilities, Section 1859.76(c)

TYPE OF DRAWING	FULL DETAILS TO SUPPORT COST ESTIMATE
Plumbing	<ul style="list-style-type: none"> <li>• Water</li> <li>• Gas</li> <li>• Sewer</li> </ul>
Mechanical	<ul style="list-style-type: none"> <li>• HVAC</li> </ul>
Electrical	<ul style="list-style-type: none"> <li>• Primary lines</li> <li>• Secondary lines</li> <li>• Transformer</li> </ul>
Communication System	<ul style="list-style-type: none"> <li>• Telephone</li> <li>• Cable Television</li> <li>• Internet</li> </ul>

**Architectural**

TYPE OF DRAWING	FULL DETAILS TO SUPPORT COST ESTIMATE
Site Plan	• To verify scope of work or teaching stations for new construction, if applicable
Floor Plan	• To verify scope of work for new construction, if applicable
Relocatable Plans	• If applicable

**Modernization Submittals**

TYPE OF DRAWING	FULL DETAILS TO SUPPORT COST ESTIMATE
Site Plan	• To verify scope of work
Floor Plan	• To check for new construction, if applicable
Demolition Plans	• To verify that like-for-like facilities are being replaced
Relocatable Plans	• If applicable
Elevator	• To verify additional grant, if applicable

# 3 APPENDIX

## Sample AutoCAD® Index

### Index.Doc File

List of the OPSC submittal documents included on disk:

SHEET NO.	ARCHITECTURAL DRAWINGS	ARCHITECTURAL AUTOCAD® FILES
	Title Sheet, Notes, Abbreviations, Symbols	66555-TS1.DWG
SP-2	Site Plan	66555-SP2.DWG
A-3	Demolition of Second Floor Plan	66555-A3DFP2.DWG
A-4	Admin Office Enlarged Floor Plan	66555-A4EFPA.DWG
A-5	Interior Elevation	66555-A5IE.DWG
A-6	Building Section	66555-A6BS.DWG
A-7	Roof Plan	66555-A7RP.DWG
A-8	Door Schedules	66555-A8DS.DWG
AD-9	Typical Details	66555-AD9TD.DWG

Note: The OPSC requires drawing CAD files to be readable by AutoCAD® Release 2000 for Windows 2000 and use only the .DWG file format extension.

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# 4 APPENDIX

## Municipal Ordinance Sample

RESOLUTION NO. \_\_\_\_\_

A RESOLUTION OF THE CITY COUNCIL  
OF THE CITY OF  
ESTABLISHING AND IMPOSING UPDATED IMPACT FEES  
FOR DEVELOPMENT PROJECTS

At a Regular Meeting of the City Council of the City of \_\_\_\_\_ duly called and held on \_\_\_\_\_ at \_\_\_\_\_ p.m. on said day, it was moved by Councilmember \_\_\_\_\_, seconded by Councilmember \_\_\_\_\_ and carried that the following Resolution be adopted:

WHEREAS by Ordinance Number \_\_\_\_\_, adopted on \_\_\_\_\_, the City Council of the City of \_\_\_\_\_ granted authority to establish and charge development impact fees as a condition of approval of a development project for the purpose of defraying the costs of public facilities (including public improvements, public services and community amenities) related to development projects; and

WHEREAS development impact fees may be established and charged to pay for the cost of development of streets and thoroughfares, law enforcement facilities and equipment, fire facilities and equipment, general city facilities, storm drainage facilities, wastewater treatment facilities, wastewater collection facilities, water supply and holding facilities, water distribution facilities, and parks and recreation facilities; and,

WHEREAS in that Ordinance the City Council of the City of \_\_\_\_\_ provided both that in enacting resolutions establishing and imposing such impact fees the City Council shall set forth the specific amount of the fee, describe the benefit and impact areas on which the development impact fee is imposed, list the specific public improvements to be financed, describe the estimated cost of the facilities, describe the reasonable relationship between the fees and the various types of developments, and set forth the time for payment and that the City Council may further provide in such resolution that specific limitations will apply to reductions, adjustments, waivers, or deferrals of development impact fees and further that the City Council may, in such resolution, set forth such specific limitations; and,

WHEREAS, on \_\_\_\_\_ the Council established and imposed impact fees by the adoption of Resolution \_\_\_\_\_ based upon the findings of a Report referred to in Resolution, prepared by \_\_\_\_\_ in \_\_\_\_\_ (the \_\_\_\_\_ Report); and,

WHEREAS \_\_\_\_\_ has prepared a report dated \_\_\_\_\_, entitled \_\_\_\_\_ (Report) which analyzes the impacts of contemplated future development of existing public facilities in the City, along with an analysis of the need for new public facilities and improvements required by new development, and

said Report sets forth the relationship between new development, the needed facilities and their estimated costs; and

WHEREAS City staff has reviewed the service provision and development impact cost portions of said Report, thereby independently verifying and validating said Report; and

WHEREAS the aforesaid \_\_\_\_\_ Report (as well as all material supplementary thereto, and all background data referenced in the Report), and a copy of Ordinance No. \_\_\_\_\_ were available for public inspection and review at the City Clerk's office of the City of \_\_\_\_\_ for a period of at least ten (10) days prior to said public hearings; and mailed notice was given at least fourteen (14) days prior to said hearing to any interested person who filed a written request (if any) with the City for mailed notice of the public hearing; and

WHEREAS the \_\_\_\_\_ public hearing was also noticed pursuant to and in compliance with Government Code Section 6062(a), and was held as part of a regularly scheduled meeting of the City Council of the City of \_\_\_\_\_.

WHEREAS a public hearing on adoption of this resolution and the impact fees referred to herein was set and held by the City Council on \_\_\_\_\_ at the Council Chambers, City Hall, \_\_\_\_\_ Street, \_\_\_\_\_, California; and

NOW THEREFORE, in accordance with the provisions of Ordinance No. \_\_\_\_\_ and Government Code Section 66000, et seq., BE IT RESOLVED by the City Council of the City of \_\_\_\_\_ as follows:

1. All provisions set forth above are true and correct and are hereby incorporated herein by reference as findings. The \_\_\_\_\_ Report and Resolution No. \_\_\_\_\_ are also incorporated herein by reference.
2. The purpose of the fees set forth herein is to finance public facilities to reduce the impacts on public facilities caused by new development.
3. The City Council hereby adopts and approves the aforesaid \_\_\_\_\_ Report, as modified, following a public hearing on the matter and the same is incorporated herein, and the Council further finds that new development in the City will generate additional demands on public facilities throughout the City, and will contribute to the impact upon public facilities.
4. The Council finds that the updating, establishing, imposition and continuation of development impact fees as described in the \_\_\_\_\_ Report is necessary and proper to pay for the cost of development of streets and thoroughfares, law enforcement facilities and equipment, fire facilities and equipment, general city facilities, storm drainage facilities, wastewater treatment facilities, wastewater collection facilities,

water supply and holding facilities, water distribution facilities, and parks, and recreation facilities in and for the City of \_\_\_\_\_.

5. The Council further finds that the specific amount of the updated fee, the description of the benefit and impact area on which the development impact fee is imposed, the listing of the specific public improvements to be financed, the description of the estimated cost of the facilities, the description of the reasonable relationship between the fees and the various types of developments, and the time for payment set forth in the \_\_\_\_\_ Report and below in this resolution are proper and necessary and the information and data upon which the fees are based is correct and accurate.
6. The specific amount of development impact fees are hereby updated, modified and imposed and are based upon the impact costs by land use as set forth in the table below:

FEE TYPE	FEE PER UNIT OR ACRE
<b>STREETS AND THOROUGHFARES:</b>	
Residential	
Single family	\$ ____/unit
Multi-family	____/unit
Commercial	____/acre
Industrial	____/acre
provided, however, for any commercial or industrial project, the owner or developer may request in writing that the Streets and Thoroughfares impact fee be calculated by using the Alternative Cost Methodology outlined on page ____ of the _____ Report referred to in Resolution No. ____ of the City of _____, except that the average cost per daily trip shall be \$ _____, and upon receipt of the request, the City shall request the City Engineer to calculate the impact fee using the applicable Alternative Cost Methodology.	
<b>LAW ENFORCEMENT FACILITIES, EQUIPMENT AND TRAINING:</b>	
Residential	
Single family	\$ ____/unit
Multi-family	____/unit
Commercial	____/acre
Industrial	____/acre

FEE TYPE	FEE PER UNIT OR ACRE
FIRE FACILITIES, EQUIPMENT AND TRAINING: Residential Single family Multi-family Commercial Industrial	  \$ ____ /unit ____ /unit ____ /acre ____ /acre
GENERAL MUNICIPAL FACILITIES: Residential Single family Multi-family Commercial Industrial	  \$ ____ /unit ____ /unit ____ /acre ____ /acre
STORM DRAINAGE FACILITIES: Residential Single family Multi-family Commercial Industrial	  \$ ____ /unit ____ /unit ____ /acre ____ /acre
WASTEWATER TREATMENT AND DISPOSAL FACILITIES: Residential Single family Multi-family Commercial Industrial	  \$ ____ /unit ____ /unit ____ /acre ____ /acre
<p>provided, however, for any commercial or industrial project, the owner or developer may request in writing that the Wastewater Treatment and Disposal Facilities impact fee be calculated by using the Alternative Cost Methodology outlined on page ____ of the _____ Report referred to in Resolution No. ____ of the City of _____, except that the cost per gallon shall be \$ ____, and upon receipt of the request, the City shall request the City Engineer to calculate the impact fee using the applicable Alternative Cost Methodology.</p>	



FEE TYPE	FEE PER UNIT OR ACRE
WASTEWATER COLLECTION FACILITIES:	
Residential	
Single family	\$ ____ /unit
Multi-family	____ /unit
Commercial	____ /acre
Industrial	____ /acre
WATER SUPPLY AND HOLDING FACILITIES:	
Residential	
Single family	\$ ____ /unit
Multi-family	____ /unit
Commercial	____ /acre
Industrial	____ /acre
provided, however, for any commercial or industrial project, the owner or developer may request in writing that the Water Supply and Holding Facilities impact fee be calculated by using the Alternative Cost Methodology outlined on page ____ of the ____ Report referred to in Resolution No. ____ of the City of _____, except that the cost per gallon shall be \$ _____, and upon receipt of the request, the City shall request the City Engineer to calculate the impact fee using the applicable Alternative Cost Methodology.	
WATER DISTRIBUTION FACILITIES:	
Residential	
Single family	\$ ____ /unit
Multi-family	____ /unit
Commercial	____ /acre
Industrial	____ /acre
PARKS AND RECREATION FACILITIES:	
Residential	
Single family Detached	\$ ____ /unit
Single family Attached	____ /unit
Multi-family, 2-4 units	____ /unit
Multi-family, 5+ units	____ /unit
Mobile Homes	____ /acre

7. The benefit and impact areas on which the development impact fee is imposed are as described in the \_\_\_\_\_ Report, and annexations to the City after the adoption of said documents; the costs are as set forth in paragraph \_\_\_\_ above, listing the specific

public improvements to be financed, which listing is based on the estimated cost of the facilities in such area.

8. There is a reasonable relationship between the updated, modified fees and the various types of developments based on the finding of the City Council that development impact costs for each type of infrastructure and land use category are as set forth in the table attached hereto as Exhibit "A" and incorporated herein by this reference, showing a Summary of Development Impact Fees as calculated by \_\_\_\_\_ in its Report. The facts and evidence presented also establish that there is a reasonable relationship between the need for the described public facilities and the impacts of the types of development described hereinabove, for which the corresponding fee is charged, and also, there is a reasonable relationship between the fee's use and the type of development for which the fee is charged, as these reasonable relationships or nexuses are in more detail described in the \_\_\_\_\_ Report.
9. Payment of the updated, modified fees established and imposed by this resolution shall be made at the time of issuance of a building permit for any work of improvement, or at such earlier date as allowed by State law, provided, however, that an applicant for a building permit may request that payment be deferred until the date of final inspection or the date the certificate of occupancy is issued, whichever occurs first. Said request shall be approved when the property owner signs a contract, approved by the City attorney, relating to the payment of the deferred fees.
10. Any person subject to a fee required by this resolution may apply to the City Council for a reduction, adjustment, or waiver of that fee based upon the absence of a reasonable relationship between the impact of that person's commercial, industrial or residential development project on demands on various infrastructure types in the City of \_\_\_\_\_.
11. The fees set forth herein are consistent with the City's General Plan and the Council has considered the effects of the fees with respect to the City's housing needs (as established in the Housing Element of the General Plan) and the regional housing needs.
12. Any judicial action or proceeding to attack, review, set aside or annul this resolution shall be brought within 120 days of its adoption.
13. Pursuant to California Government Code Section 66017, the updated, modified fees adopted and approved by this resolution shall be in full force and effect and shall be collected beginning sixty (60) days from and after its adoption. On the effective date of this resolution, any development impact fees or charges previously adopted by the Council pursuant to Resolution \_\_\_\_\_ are and shall be repealed and superseded by the impact fees adopted herein.

14. If there is any inconsistency between the findings or determinations of the Council herein and those made or contained in Resolution 9246, the findings and determinations of this Resolution shall prevail.

Passed and adopted at a Regular Meeting of the City Council of the City of \_\_\_\_\_ held on the \_\_\_\_\_ day of \_\_\_\_\_ by the following vote:

AYES:  
NOES: \_\_\_\_\_  
ABSENT: \_\_\_\_\_  
ABSTAIN: \_\_\_\_\_

APPROVED:

\_\_\_\_\_  
Mayor

ATTEST:

City Clerk

CERTIFICATE

STATE OF CALIFORNIA )  
COUNTY OF ) s.s  
CITY OF )

I, \_\_\_\_\_, City Clerk of the City of \_\_\_\_\_ do hereby certify the foregoing Resolution of the City Council of the City of \_\_\_\_\_ was duly passed and adopted at a Regular Meeting of the City Council held on \_\_\_\_\_.

DATED: \_\_\_\_\_

City Clerk

CITY OF  
IMPACT FEE SUMMARY - \_\_\_\_\_

Fee	Single-Family Residential Unit	Multi-Family Residential Unit	Commercial Acre	Industrial Acre
	Fee	Fee	Fee	Fee
Streets and Thoroughfares	991	649	18,663	3,631
Law Enforcement	194	173	681	45
Fire	220	283	1,346	953
General Municipal Facilities	607	214	1,822	1,822
Storm Drainage	(2,154/acre)#	(3,949/acre)#	5,700	5,700
Wastewater Treatment/Disposal	541	397	1,730	5,994
Wastewater Collection	243	179	778	2,724
Water Supply/Holding	1,067	667	1,314	6,217
Water Distribution	147	110	296	2,064
Parks and Recreation***	1,462	1,247	N.A.	N.A.
<b>Total</b>	<b>6,190#</b>	<b>4,383#</b>	<b>32,350</b>	<b>29,160</b>

\*\*\* Mobile Homes, \$ \_\_\_\_\_ /unit, now \_\_\_\_\_  
 # Storm drainage acreage fee: \$ \_\_\_\_\_ new  
 Single family \$ \_\_\_\_\_ new  
 Multiple family \$ \_\_\_\_\_ new

## 5 APPENDIX

# Frequently Asked Questions

The following are the most commonly asked questions and the responses:

**Q.**

**Do plans and specifications require DSA approval?**

Yes. Existing law, the Field Act, requires a school district, prior to contracting for the construction or alteration a school building, to obtain written approval of the construction plans by the DGS through DSA pursuant to designated structural safety and other standards.

**Q.**

**Why is a copy of the DSA stamp needed?**

DSA approved submittals require certification from the architect that the electronic AutoCAD® drawings represent the DSA approved plans.

A copy of the specification page, plan sheet, or a scanned copy on disk showing the DSA stamp and date must be included with the submittal to provide verification the plans actually have DSA approval and have been checked by all DSA sections.

**Q.**

**Why are lump sums figures considered ineligible?**

Eligible sums must be itemized so costs can be verified. Use item type, size, quantity, unit, and per unit cost. See the example provided on the first page of the Cost Estimate Section.

**Q.**

**How are overhead, profit (OHP), and general conditions estimates accepted by the plan verification staff?**

General Conditions, OHP, bonds, geographic adjustments are determined in accordance with the latest publication of the Lee Saylor's Current Construction Costs or fixed at fifteen percent (15%).

**Q.**

**What cost estimating references do plan reviewers use?**

Plan Verification Team plan reviewers use Current Construction Costs published by Saylor Publications, Inc. or Means Building Construction Cost Data if an item is not listed in the Saylor publication.

**Q.**

**Can hard copy plans and specifications be submitted to the OPSC?**

Yes.

**Q.****How should electronic documents readable by AutoCAD® be indexed?**

An accurate cross-reference of the electronically submitted files assists the Plan Verification Team to review plans. An electronic file labeled "Index.doc" needs to be included for each application package. This file should match the Index of Drawings on the plans and needs to include the electronic file name for each sheet in the plan set. A sample Index is included in Appendix 3 of these Guidelines.

Symbol files, font files, external reference files and other files required to correctly display the drawings should be included in the same directory as the AutoCAD® files. AutoCAD® files that do not correspond to a printed sheet should not be listed in the cross reference index.

Layers and zoom images should be set to open to a complete page image.

**Q.****What format is required for the electronic submittal of plans and specifications?**

The OPSC uses AutoCAD® Release 2000 for Windows 2000. A complete set of AutoCAD® files for the school site should be submitted in AutoCAD® 12, 13, 14, or 2000 format on an Iomega® zip disk or CD-ROM. Do not compress the drawing files. The electronic file names should be clearly cross-referenced to standard title sheet names. Separate folders should contain related files by logical division, i.e., specs, architectural, civil, plumbing, etc.

Plans can also be submitted as raster or scanned images.

Specifications may be submitted on 3½" floppy disks or combined with the plans on Iomega® zip disk or CD-ROM.

# 6 APPENDIX

## Sample Off-Site Development Letter

Office of Public School Construction  
1130 K Street, Suite 400  
Sacramento, CA 95814

**Subject:** Application Number (*your OPSC number*)  
(*your school*) Unified School District

Dear (*your project manager*),

The (*your local entity*) has received the final off-site plans and specifications (P&S) for the proposed (*school name*) project submitted by the (*district name*) School District. The P&S have been reviewed and I certify that the following off-site improvements, as shown in the P&S, are required by local ordinances and comply with the standard requirements as set forth by the (*your local entity*) for the following street improvements:

Off-Site Improvements

- Curbs, gutter, driveway approaches, and street paving
- Public utility and storm drain connections
- Public sidewalks
- Public Street Lighting

The elements of the off-site improvements shown on the plans do not exceed the minimum requirements to develop the site to meet (*your local entity*) requirements.

The (*your local entity*) would like to thank you in advance for assisting the District in securing funding for this critical project. Please feel free to call me at (*contact person's phone number*) if you need any additional information.

Sincerely,

(*contact person's name*)  
(*your local entity*)